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國際學碩士學位論文

**Comparative Research on Competiveness of
Shopping Tourism Industry**

- South Korea and Hong Kong

한국 - 홍콩의 쇼핑관광 경쟁력 비교분석

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Comparative Research on Competiveness of Shopping Tourism Industry

- South Korea and Hong Kong

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By

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Abstract

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- South Korea and Hong Kong

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The success of the tourism industry is determined by its competitiveness. A destination is competitive when it can attract and satisfy travelers. And, that competitiveness is determined by factors that influence the performance of people or organizations involved in providing the tourism products.

As we know, tourism's purpose can be divided into many kinds, such as medical tourism, cultural tourism, historical tourism and so forth. Among

them, 'Shopping' has risen as one of most significant component of the tourism industry. Even in recent years, shopping has turned out to be a determining factor for destination selection and an important part of the travel experience. Hence, shopping tourism destinations around the world have a great opportunity to exploit this new market by developing unique and attractive shopping tourism experiences.

In recent years, with growing living standards and high demand for foreign brands, the amount of outbound Chinese tourists has increased dramatically, and among the variety of destinations, Korea has turned out to be one of prime destinations for Chinese because it is geographically close to mainland China and famous for 'Han-Ryu' culture as well. This trend is a considerable opportunity for Korean economic development, so the Korean government has made several promotions such as 'Korean Black Friday' and 'tax refunds' to attract more potential Chinese tourists.

But recently we are facing two challenges: one is increasing dissatisfaction with Korea, the other one is the rise of other competing destinations such as Hong Kong. According to a report by Korean Tourism organization, Chinese dissatisfaction rate has risen to 6.1% in 2014 from 2.2% in 2011. This has brought about unwillingness to revisit Korea and

researchers say if this problem is not figured out, there will be big challenge with sustainable development of the shopping tourism industry.¹

With this background, this research explores the competitiveness of Korean shopping tourism industry by using Importance Performance Analysis (IPA). To provide implications for policy makers, a comparative analysis between Korea and Hong Kong has been undertaken. Factors pertaining to the destinations' competitiveness were used to build an instrument that was used to make a survey for visitors from mainland China. Respondents were asked to rate the factors for importance and performance. The results were analyzed and discussed with the IPA grid. This research offers a quantitative analysis that can provide information for policy and managerial decisions in the shopping tourism industry.

Keyword: shopping tourism destination, Korea, Hong Kong, China, competitiveness, Importance-Performance Analysis (IPA)

Student Number: 2014-24305

¹ 장병권. 2015. 「중국관광객 유치 활성화를 위한 대응 과제」, 『KERI 정책제언』 15-21, pp. 8-15

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I. Introduction

History of Shopping Tourism

‘Tourism’ encompasses the activities of travelling to and staying in outside country for less than one year for leisure, business or other purposes. Based on this definition, the tourism industry includes all the activities involved in providing goods and services to the visitors.

Over the years, the tourism industry has experienced fast growth and became one of the important economic sectors in the world. In 2012, the total number of international tourist for the first time surpassed 1 billion visitors and it is expected that the tourism industry’s contribution to the world’s GDP will grow by 4.4% on average each year. This will remain strong despite the ongoing global economy recession.

Shopping tourism, as one of tourism sectors, has emerged as a growing industry. Now, shopping not only is a prime motivation for travel destination selection, but also is one of the major activities undertaken by travelers. UNWTO Secretary-General Taleb Rifai said: “Few sectors can boast of their power to inspire growth and create jobs as tourism and shopping can. Jointly harnessed, this can have an immense impact on a destination’s brand and

positioning.”²

Shopping tourism came to the world after specialization in production took place. Since then, those who are living in remote areas travel long distances to purchase what they needed. Now, shopping is becoming an increasingly important factor in tourism activities and this trend reflects the changing demand on consumption in modern society.

Korean Shopping Tourism

Since the beginning of 21st century, with the globalization of Korean culture, the number of foreign visitors to Korea has been increased year by year. The growth rate of the inbound tourism market reached 67.1% in over the 5 years. For the foreign tourists, one of the most charming points of Korea are its abundant shopping resources — from the very affordable, high quality Korean cosmetics to the luxury, fashionable clothing. A survey made by the Ministry of Culture, Sports and Tourism found nearly 78 percent of foreigner who visited Korea do so for the purpose of shopping, and their shopping activities has a positive effect on domestic consumption.

² "World Tourism Organization UNWTO." UNWTO Launches Global Report on Shopping Tourism. Accessed July 22, 2016. <http://media.unwto.org/press-release/2014-05-22/unwto-launches-global-report-shopping-tourism>.

Among a variety of countries, Chinese visitors are the most noticeable, not only because they have become ‘Champions’ in terms of the amount of visitors, but also because the amount of money spent by them is far higher than any other foreign visitors: According to the Korea Tourism Organization, the number of Chinese visitors has been increasing year by year, and in 2014 superseded Japan in number. Moreover, average spending by Chinese has been increasing dramatically since 2008 and now the amount is higher than American and Japanese travelers combined.

According to the Korea Economic Research Institute, Chinese people spend more than 60% of their budget on the shopping, while other tourists spends only 40% on it. And it is expected that in the next 5 years, the total amount spent by Chinese visitors will comprise 1.6% of Korea’s entire GDP, and nearly 900 thousand of jobs will be generated. So we can see, the impact of Chinese visitors on the Korean economy is very significant.³

As such, the Korean government has taken a variety of measures such as the recent promotion of a ‘Korean Black Friday Event’ and a government subsidy with ‘Tax refund system’ to promote tourists spending and re-

³ 장병권. 2015. 「중국관광객 유치 활성화를 위한 대응 과제」, 『KERI 정책제언』 15-21, pp. 8-15

visiting.⁴ But even so, Chinese people's satisfaction with the Korean tourism industry has been dropping and this has further brought about unwillingness in revisiting: A report by the Korean Tourism Organization shows Chinese dissatisfaction rate has risen to 6.1% in 2014 from 2.2% in 2011 and complaints relevant to the shopping have played a major part. This in turn brought about a decreasing number of return-visitors to Korea.

By contrast, Hong Kong, one of the biggest shopping tourism destinations, has enjoyed a far better reputation with Chinese tourists: it is indicated that tourist's satisfaction with Hong Kong in terms of tourism was 93% and willingness to revisit was 94%, which is far higher than Korea. The results of this survey show us that Korea still needs to improve various aspects to be more competitive.⁵

In this study, the Importance–Performance Analysis (IPA) is adopted to compare the differences and similarities between Korea's and Hong Kong's shopping tourism competitiveness. With this approach, we can explore the relative strong and weak points of South Korea and then make policy

⁴ "S. Korea to Hold Shopping Festival for Foreign Tourists in Fall." Yonhap News Agency. Accessed July 22, 2016. <http://english.yonhapnews.co.kr/news/2016/04/27/0200000000AEN20160427010500320.html>.

⁵ "TSQI_2015." PolyU TSI and TSQI. Accessed July 22, 2016. <http://www.touristsatisfaction.org/20151.html>.

implications.

II. Research Question

Through the background we can see the shopping tourism industry has turns out to be one of the important pillars of South Korean economic development. And it is also clear that among a variety of countries, China plays an important role because the amount mainland Chinese tourists, who spend a lot on shopping, comprises more than half of total foreign visitors.

However, figures show that Chinese tourists are not so satisfied with Korean shopping tourism. It also shows that Hong Kong, one of the most famous shopping tourism destinations, receives a far better review from Chinese visitors.

Based on the awareness of the situation, three research questions have been raised:

- From mainland Chinese people's perspective, what are the strong and weak points of the Korean shopping tourism industry?
- From mainland Chinese people's perspective, what are the strong and weak points of Hong Kong's shopping tourism industry?

- To boost shopping tourism up, what must we learn from Hong Kong?

III. Literature review

1. Tourism Destination Competitiveness

Crouch and Ritchie (1999) defined destination competitiveness as “a destination’s capability to increase the quality of life of residents”.⁶ Based on this, Dwyer and Kim (2003) explained the concept more comprehensively by introducing three parts of competitiveness: price competitiveness, strategy/management competitiveness, and history /cultural competitiveness.⁷ These efforts have contributed a lot for identifying and defining the concept of destination competitiveness, but even so, there have rarely been models built to evaluate destination competitiveness. Some scholars like Mayer employed Porter’s ‘Generalized Double Diamond Model’ (GDDM) for competitiveness analyzing. She

⁶ Crouch, Geoffrey I., and J.r.brent Ritchie. "Tourism, Competitiveness, and Societal Prosperity." *Journal of Business Research* 44, no. 3 (1999): 137-52. doi:10.1016/s0148-2963(97)00196-3. PP. 137-152

⁷ Dwyer, Tim, Kim Marriott, and Michael Wybrow. "Topology Preserving Constrained Graph Layout." *Graph Drawing Lecture Notes in Computer Science*, 2009, 230-41. doi:10.1007/978-3-642-00219-9_22. Pp. 230-41

modified the GDDM and introduced a tourism competitiveness model that has five factors: management, organization, appeal, information, and efficiency.⁸ This model greatly helped in tourism destination evaluation, but some researchers like Hassan claim there are several kinds of limitations on that model one of which was the model's insufficiency in terms of the tourism context. Instead, he emphasizes the four contexts of tourism competitiveness are: demand orientation, comparative advantage, industry structure, and environmental commitment.⁹ But this model has also been criticized: Hudson claims the model failed to clarify key factors such as environmental sustainability and market capability.¹⁰

Crouch and Ritchie (2003) developed an evaluation model called 'Competitiveness Sustainability' and it is the most frequently cited in the tourism research field.¹¹ They believe the goal of tourism development is

⁸ Mayer, Karl, and Charles Lee. "Introduction." *Journal of Travel & Tourism Marketing* 12, no. 2-3 (2002): 1-2. doi:10.1300/j073v12n02_01.

⁹ Hassan, Siuki. "A Tourism Demand Based Method of Geosites Assessment on Geotourism Prioritization Modeling: The Case of Razavi Khorasan Province." *Journal of Hospitality Management and Tourism J. Hosp. Manage. Tourism* 3, no. 5 (2012): 82-94. doi:10.5897/jhmt12.009. pp. 82-94.

¹⁰ Hudson, Simon. "Drive Tourism. Trends and Emerging Markets." *Tourism Management* 33, no. 5 (2012): 1288-289. doi:10.1016/j.tourman.2011.11.015.

¹¹ Ritchie, J. R. Brent., and Geoffrey I. Crouch. *The Competitive Destination: A Sustainable Tourism*

to achieve sustainable competitiveness of a destination by improving the life standard of resident, and based on this concept, they proposed a model that analyzes the relationship between social prosperity and the tourism industry. It covers most of the components that are relevant to the tourism industry and can analyze the complicated, fragmented nature of the industry.

‘Competitiveness-Sustainability’ has been continuously modified by researchers since its introduction, and regarded as the most comprehensive tourism competitiveness evaluation model so far.

However, its complicating features reversely led to its difficulty in testing, and consequently, researches who adopted the model and measures with the components of the model turned out to be forced to concentrate only on specific factors or failed to estimate multiple factors.

Kim and Dwyer (2003) evaluated the tourism competitiveness of nearly 200 countries with eight factors: price, technology, infrastructure, openness, social environment, human tourism, nature environment, human resources. Using this factor analysis, they calculated weights of each factor

to compute a tourism competitiveness index.¹² They seemed to build the indicators by relying only on secondary data, even if comprehensive destination competitiveness can't be developed with this kind of data alone.

2. Shopping tourism

Shopping tourism is different from any other kind of tourism in terms of its patterns and purposes. Timothy made an assumption that shopping demands and desires are one of the motivations for travelers to visit certain destinations. Based on this regard, Timothy further defined shopping tourism as a sort of tourism in which the main purpose is purchasing goods and services in other places for non-profit purposes.¹³ Liu and Wang (2010) made a further comprehensive definition. According to them, shopping tourism includes all the activities of traveling such as dining out, purchasing goods and services, enjoying attractions, and this concept is not supposed to be restricted as tourism that has shopping as its prime purpose.¹⁴ Murphy and

¹² Dwyer, Larry, and Chulwon Kim. "Destination Competitiveness: Determinants and Indicators." *Current Issues in Tourism* 6, no. 5 (2003): 369-414. doi:10.1080/13683500308667962. pp. 381-401

¹³ Timothy, Dallen J. *Shopping Tourism, Retailing, and Leisure*. Clevedon, UK: Channel View Publications, 2005.

¹⁴ Liu, Jiaming, and Run Wang. "Attractive Model and Marketing Implications of Theme Shopping

Gregg (2003) identified the differences between shopping tourism and other tourism by their characteristics and behaviors. Their research shows that shopping tourists participated more actively in shopping than non-shopping travelers.¹⁵ In this regard, shopping tourism is thought of as normal economy activities shaped by purchasing goods and services. Even if the term of shopping tourism has been explained in various ways, all of these concepts focus on the role of shopping.

Yu and Littrell (2005) analyzed the relationship between destination competitiveness and shopping behavior-satisfaction, with the three findings included bellow:

2-1 . Although travelers consider functional factors as more important than hedonic factors (such as a destinations charming points), hedonic factors have greater impact on shopping satisfaction than functional factors.

2-2 . Travelers are more actively participating in shopping activities

Tourism Destination." *Chin. Geogr. Sci. Chinese Geographical Science* 20, no. 6 (2010): 562-67. doi:10.1007/s11769-010-0422-4. pp. 562-567

¹⁵ Snepenger, David J., Leann Murphy, Ryan O'Connell, and Eric Gregg. "Tourists and Residents Use of a Shopping Space." *Annals of Tourism Research* 30, no. 3 (2003): 567-80. doi:10.1016/s0160-7383(03)00026-4. pp. 567-571

when their regard towards the importance of hedonic values on shopping increases, showing the positive relationship between hedonic value on shopping and shopping activities.

2-3. Tourists who often purchase goods impulsively have higher hedonic values on shopping than those of non-shopping tourists.¹⁶

Similar to their study, recent research' findings conclude that hedonic values have greater impacts on shopping tourism satisfaction than functional value. For example, Yuksel identified the purchasing behaviors made by shopping tourists. Yuksel first identified the impact of awareness on stimulation and pleasure as well as the effect of two factors on the shopping tourist's functional and hedonic values, and then found out the effect of these values on shopping behaviors.¹⁷ The finding demonstrates that awareness plays a significant role in the behavior of shopping tourists. Accordingly, shopping travelers exhibit positive purchasing behaviors when

¹⁶ Yu, Hong, and Mary Ann Littrell. "Tourists' Shopping Orientations for Handcrafts." *Journal of Travel & Tourism Marketing* 18, no. 4 (2005): 1-19. doi:10.1300/j073v18n04_01. pp. 12-15

¹⁷ Yüksel, Atila, and Fisun Yüksel. "Shopping Risk Perceptions: Effects on Tourists' Emotions, Satisfaction and Expressed Loyalty Intentions." *Tourism Management* 28, no. 3 (2007): 703-13. doi:10.1016/j.tourman.2006.04.025. pp.706-710

they are settled in an optimum shopping destination.

3. Shopping tourism satisfaction

Shopping tourism satisfaction is a traveler's subjective evaluation on a shopping tourism experience. This satisfaction originates from the hedonic feeling generated when tourists do shopping activities. In this regard, Wong and Wan empathized that certain factors influence hedonic values of shopping tourism and they include goods purchased and overall experience (such as attractive goods, good services and proper prices) travelers received from their tourism destination.¹⁸

Based on this, several kinds of researches were conducted to evaluate the level of shopping tourism satisfaction.

3-1. Internal level: factors of this level come from travelers' personal demands for tourism, and are psychographic.

¹⁸ Wong, I. A., and Y. K. P. Wan. 2012. "A Systematic Approach to Scale Development in Tourist Shopping Satisfaction: Linking Destination Attributes and Shopping Experience." *Journal of Travel Research* 52, no. 1 (2012): 29-41. doi:10.1177/0047287512457263. pp. 34-38

3-2 . External level: factors of this level originate from a shopping tourism destination itself, such as the price of products, services, and shopping environment.

Wong and Wan state that shopping tourism satisfaction can be evaluated in terms of service quality, product and environmental quality, and merchandise attitudes.¹⁹

Heung and Cheng introduce four factors that have an impact on shopping tourism satisfaction: physical quality, service quality, product quality and reliability. Physical factors include store settings, product display, and accessibility to shopping destination, as well as the atmosphere of a store. Facilities such as transportation, accessibility, security, language have impact on shopping tourism satisfaction as well.²⁰ Abrudan(2014) further clarified the service factor: it includes staff's language skills and attitude toward customers, knowledge and perceived trustworthiness. He also identifies product factors including payment method, acceptable price

¹⁹ Wong, I. A., and Y. K. P. Wan. 2012. "A Systematic Approach to Scale Development in Tourist Shopping Satisfaction: Linking Destination Attributes and Shopping Experience." *Journal of Travel Research* 52, no. 1 (2012): 29-41. doi:10.1177/0047287512457263. pp. 34-38

²⁰ Heung, V. C. S., and E. Cheng. "Assessing Tourists' Satisfaction with Shopping in the Hong Kong Special Administrative Region of China." *Journal of Travel Research* 38, no. 4 (2000): 396-404. doi:10.1177/004728750003800408.

tag, and product diversity.²¹

IV. Methodology

1. Importance Performance Analysis (IPA)

Importance Performance Analysis (IPA) is a marketing methodology that often used for evaluating both the strengths and weaknesses of a certain industry. Its evaluation often includes the process below:

1-1 . In the first stage, we have to find the key factors which have an impact on shopping tourism. For instance, in this research, '*Local price of goods and services*' was chosen as one of factors influencing shopping tourism industry.

1-2 . In the second stage, the survey should be built and conducted in two scales to estimate attributes. One scale evaluates the respondent's view on the 'importance' of the key factors mentioned above: the other scale is used for evaluating views on the

²¹ Abrudan, Ioana Nicoleta, and Dan-Cristian Dabija. "Measuring Clients' Satisfaction toward Shopping Centers – Empirical Evidences from Romania." *Procedia Economics and Finance* 15 (2014): 1243-252. doi:10.1016/s2212-5671(14)00584-x.

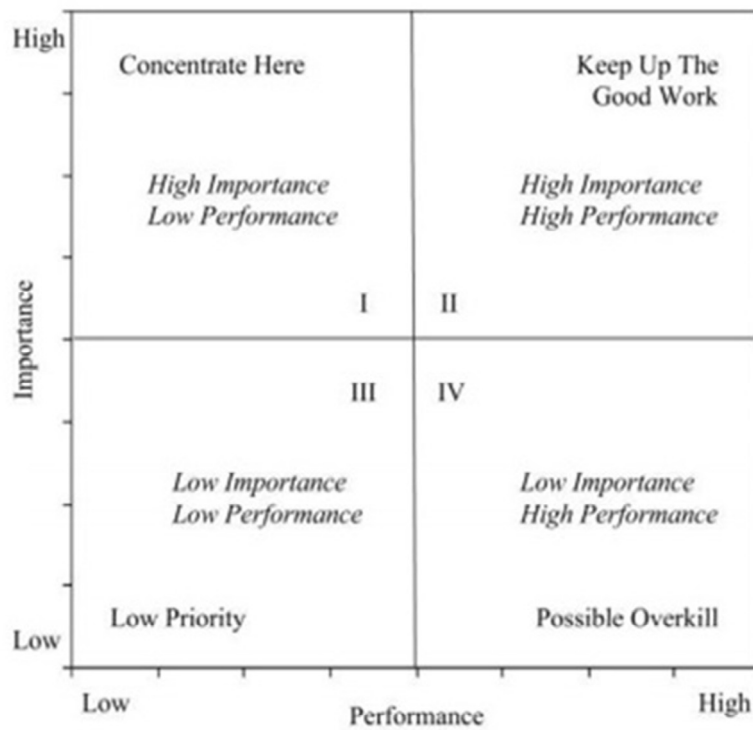
‘performance’ of the organizations that is offering items. In the survey, for instance, mainland Chinese respondents were asked the first question ‘Do you think ‘*Local price of goods and services*’ are important when you consider a shopping tourism destinations? Please rate the degree of importance from 1 to 5”, and then asked “How do you find Korean (or Hong Kong’s) ‘*Local price of goods and services*’? Please rate the Korean (or Hong Kong’s) performance in this aspect from 1 to 5.”

1-3. The third stage, is analyzing the survey data. The data of each factor will be compiled together and then calculated into mean scores. In the Korean case, the mean scores of performance in ‘*Local price of goods and services*’ was rated 3.418, and the importance in ‘*Local price of goods and services*’ was rated 3.92.

1-4. In the last part, the calculated mean scores of each factor will be put on the grid below. The vertical axis represents the ‘importance’ while the horizontal axis stands for the ‘performance’. In Korean case, the factor ‘*Local price of goods and services*’ was put on the third quadrant ‘low importance, low performance’ (refer the

Figure.1)

<Figure 1. Description of IPA grid>



Source: Journal of Service Science and Management²²

²² Meng, Qingliang, Xuan Jiang, and Lingling Bian. "A Decision-Making Method for Improving Logistics Services Quality by Integrating Fuzzy Kano Model with Importance-Performance Analysis." *JSSM Journal of Service Science and Management* 08, no. 03 (2015): 322-31. doi:10.4236/jssm.2015.83034. pp. 327

1-4-1 Quadrant One ‘Concentrate here’. Factors spotted on this quadrant mean responders think these factors are important. However, people think the performance of those factors is too low. In this case, policy-makers have to find ways to improve the performance of factors.

1-4-2 Quadrant Two ‘Keep up the good work’: value of factors in this quadrant are considered high in terms of both importance and performance, so policy-makers should maintain strong performance in regards to these factors.

1-4-3 Quadrant Three ‘Low priority’: respondents think factors in this area are not so important. Policy-makers should focus less on these factors to save resources.

1-4-4 Quadrant Four ‘Possible overkill’: factors in this quadrant are not considered important but service providers are somehow performing well on these factors. This is a waste of resources. In this case, policy-makers have to reallocate resources to other factors to improve the overall efficiency of the industry. ²³

²³ Arch G. Woodside and Drew Martin, *Tourism Management: Analysis, Behaviour and Strategy* (Wallingford, UK: CABI Pub., 2008).

The IPA has been widely used for the study of tourism industry. Martilla and James (1977) believe that measuring only the performance value could be problematic when applying the research results to policy making.²⁴ In this regard, IPA is effective and practical for industry analyzing.

2. Survey Instrument

The survey questionnaire was built with factors used in previous research. A 5-point scale was adopted to evaluate the perception of the factors for shopping tourism destinations. In the first level, Chinese responders were asked to rate the importance of each factors. In the second stage, Chinese responders were asked to estimate the value of the competitiveness of factors of two shopping tourism destinations. Considering people have a strong tendency to not actively complete a complicated survey, the measurement items were narrowed down to 5 main categories, and sub-items were given for each of the main categories. In the

²⁴ Martilla, John A., and John C. James. "Importance-Performance Analysis." *Journal of Marketing* 41, no. 1 (1977): 77. doi:10.2307/1250495.

last section, the study gathered information on responders such as sex, income, and education level. The survey was conducted by students living in mainland China, having been done both off-line and online. After the student's help in survey and data collection, a total 150 Chinese people received the survey. Among them, 121 results were considered applicable for analysis.

3. Data Analysis

In this research, the data analysis consists of 3 major steps: the analysis of the factor questions, the IPA analysis, and the comparative analysis.

The main purpose of the analysis of the factor questions is to calculate the dimensions of the scales for the IPA analysis. Cronbach's alpha was adopted for estimating the underlying factors and calculating factor loading.

Cronbach's alpha is a measure of internal consistency. That is, how closely related a set of items are as a group. It is considered to be a measure of scale reliability. Cronbach's alpha can be written as a function of the number of test items and the average inter-correlation among the items. Below, for conceptual purposes, is the formula for a standardized

Cronbach's alpha.²⁵

$$\alpha = \frac{N \cdot \bar{c}}{\bar{v} + (N - 1) \cdot \bar{c}}$$

Here, N is equal to the number of items, c-bar is the average inter-item covariance among the items and v-bar equals the average variance.

It was found that only factors whose reliability co-efficiency is higher than 0.5 are available for usage.

A measurement of Cronbach's alpha was estimated for each of the major factors. The Cronbach's result indicated that the alpha coefficient of each of the major factors were higher than 0.5, which means, acceptable.

The name of each of the 'major factors' are listed below:

3-1 . Goods and services : factors related directly to goods and service

3-2 . Society of tourism destination : such as security, people's kindness

²⁵ What Does Cronbach's Alpha Mean? Accessed July 22, 2016.
<http://www.ats.ucla.edu/stat/spss/faq/alpha.html>.

3-3 . Shopping destination quality : such as quality of duty free shop,
service attitude

3-4 . Accessibility : accessibility to Korea, shopping spots

<Table 1. The result of Reliability Coefficient (Alpha)>

Major Factor	Factors name	Variance Explained	Reliability Coefficient (Alpha)
Goods and services			0.691469
	1. Can purchase what we want	0.156983	
	2. Reliability of goods and services	0.26764	
	3. Price is acceptable	0.247978	
	4. Diversity of goods and services	0.252294	
Society of destination			0.611923
	5. Language accessibility	0.479613	
	6. Abundant tourism attraction resources	1.377628	
	7. Security	0.250549	
	8. Local price of goods and services	0.69247	
	9. Local people's kindness, manners	0.411676	
Shopping destination quality			0.65402
	10. Staff's attitude and manner	0.248207	

	11. Operation time of shopping destination	0.530364	
	12. Discount system	0.583119	
	13. Cleanliness and luxury of shops	0.466191	
	14. After services	0.42744	
Accessibility			0.79214
	15. Efficiency of local transportation,	0.567139	
	16. Accessibility to Korea (or Hong Kong)	0.365075	
	17. Accessibility to shopping information	0.3465	

V. Demographic Structure

<Figure 2. Demographic description of respondents>

Demographic profile of respondents

	Frequency (<i>N</i> = 121)	This survey (%)
<i>Gender</i>		
Male	35	29
Female	86	71
<i>Age group</i>		
0–15 yr	0	0
16–25 yr	23	19
26–35 yr	74	61
36–45 yr	16	14
46–55 yr	10	8
56–65 yr	10	8
66 yr and above	0	
<i>Education level</i>		
No formal education	0	0
Primary and elementary school	0	0
Secondary and high school	3	2
College and University	101	84
Postgraduate	17	14
<i>Experience of travel (to Korea)</i>		
1 time	78	64
2–4 times	32	27
5 times or above	11	9
<i>Experience of travel (to Hong Kong)</i>		
1 time	31	21
2–4 times	80	66
5 times or above	20	13

A total of 150 questionnaires were distributed and all of them were collected back, indicating that response rate reached 100%. But among all of the returned questionnaires, 121 were calculated to be applicable for this research. The demographic structure of the respondents is presented on the Table 3.

The gender breakdown consists of 86 females (71%) and 35 males (29%). The main age group was 26-35 year old, representing 62% of respondents. The next two groups were respectively: 16-25 year old (19%), 36-45 year old (14%). The remaining group were 20%, with 8% of 46-55 group and 8% of 56-65 group.

More than 100 of the respondents had college and university educations, accounting for 84% of total respondents. The next bigger group was post graduate, with 14% of total respondents. Those with secondary or high school education represented only 2%.

Regarding the number of outbound traveling, more than half (64%) were first time visitors to Korea. 36% had been in Korea more than two times. By contrast, 66% of Chinese had visited Hong Kong more than two times, and 34% had had tourism experience there less than twice.

VI. IPA analysis

1. Korean Case

<Table 2. Importance and Performance of Korea>

Major Factor	Factors' name	Mean value (Performance)	Mean value (Importance)
Goods and services	A. Can purchase what we want	4.254545	4.807339
	B. Reliability of goods and services	4.618182	4.445455
	C. Price is acceptable	4.472727	4.566038
	D. Diversity of goods and services	2.862385	4.504587
Society of destination	E. Language accessibility	2.254545	4.238532
	F. Abundant tourism attraction resources	3.227273	3.632075
	G. Security	4.509091	4.542857
	H. Local price of goods and services	3.418182	3.925234
	I. Local people's kindness, manners	3.327273	4.345455
Shopping destination quality	J. Staff's attitude and manner	4.454545	4.563636
	K. Operation time of shopping destination	4.545455	3.135922
	L. Discount system	4.536364	3.14433

	M. Cleanliness and luxury of shops	4.458716	4.155963
	N. After services	4.545455	4.409091
Accessibil ity	O. Efficiency of local transportation,	4.518182	4.272727
	P. Accessibility to Korea (or Hong Kong)	2.672727	4.421569
	Q. Accessibility to shopping information	3.009091	4.485981
Grand Mean Score		3.863808	4.211576

1-1 . Importance

In order to find out the degree of importance for factors considered when selecting a shopping tourism destination, the mean numbers of each factor were calculated. According to the survey results for the Table 2, among the total 17 factors, 3 were considered ‘not so much important’, ranging from 3.14433 to 3.925234. Except those, 14 factors have a mean number higher than 4, ranging from 4.155963 to 4.807339, implying that mainland Chinese tourists thought all these factors ‘important’ or ‘extremely important’ when they select shopping tourism destinations.

Of them, the top three important factors were ‘Can purchase what we want’

(mean 4.807339), 'Price of shopping goods and services' (mean 4.566038), and 'Staff's attitude and manner' (mean 4.563636). Mainland Chinese tourists consider 'Can purchase what we want' and 'Price of goods and services' as the most important factor since their prime purpose for outbound shopping tourism is to purchase goods and services which are hard to obtain within their country. Furthermore, they also regard 'Staff's attitude and manner' as an important factor. Generally, in unfamiliar circumstances, staff members are the closest people available and act as 'information-providers' for shopping travelers. A staff with good manners and attitude will make visitors feel satisfied and willing to revisit.

On the other hand, the factors of 'Operation time of shopping destination' (mean 3.135922) and 'discount system' (mean 3.14433) were considered as the least important factors. It is known that Chinese people do not actively after midnight. Especially for Chinese tourists, it is more comfortable to have shopping during the day time and take a rest in the hotel after finishing day time activities. Long opening hours are allowable but not so important for them.

1-2 . Performance of Shopping Tourism in South Korea

The mean scores of the factors relevant to Korean shopping tourism performance were also calculated. The survey results are reported in Table 5. The mean scores of all 17 factors ranged from a high of 4.618 to a low of 2.25. Mainland Chinese tourists rated ‘Reliability of goods and services’ (4.618), ‘After services’ (4.545), ‘Operation time of shopping destination’ (4.545), ‘Security’ (4.509) with high scores. This indicates from the Chinese tourist’s perspective, the Korean shopping tourism industry has advantages in these attributes.

By contrast, Chinese people rated that the worst factors as ‘Language accessibility’ (2.254), ‘Diversity of goods and services’ (2.862), ‘Accessibility to Korea’ (2.672) and ‘Accessibility to shopping information’ (3.009). Actually, it is true that most shopping spots have employed Chinese speaking Koreans or Chinese workers to lower the language barrier. But, except of these shopping regions, it is not so convenient to go out alone because most infrastructure does not provide Chinese language information and Korean people usually cannot speak Chinese. Plus, besides some visa-free region such as Jeju Island, it is not so easy for potential Chinese tourists to visit to Korea because they have to go through a complicated, time-consuming visa registration process.

The factor ‘Diversity of goods and services’ was calculated to be very low and this was the only factor below 4.00 among all factors belong to ‘goods and services’. It is true that Korea is famous for its cosmetics and fashion, but we have only a handful of brands known by Chinese. Plus, in famous shopping regions, only big companies can afford the expensive rent fee. So, what Chinese tourists can see and purchase are brands of goods provided by a few big companies.

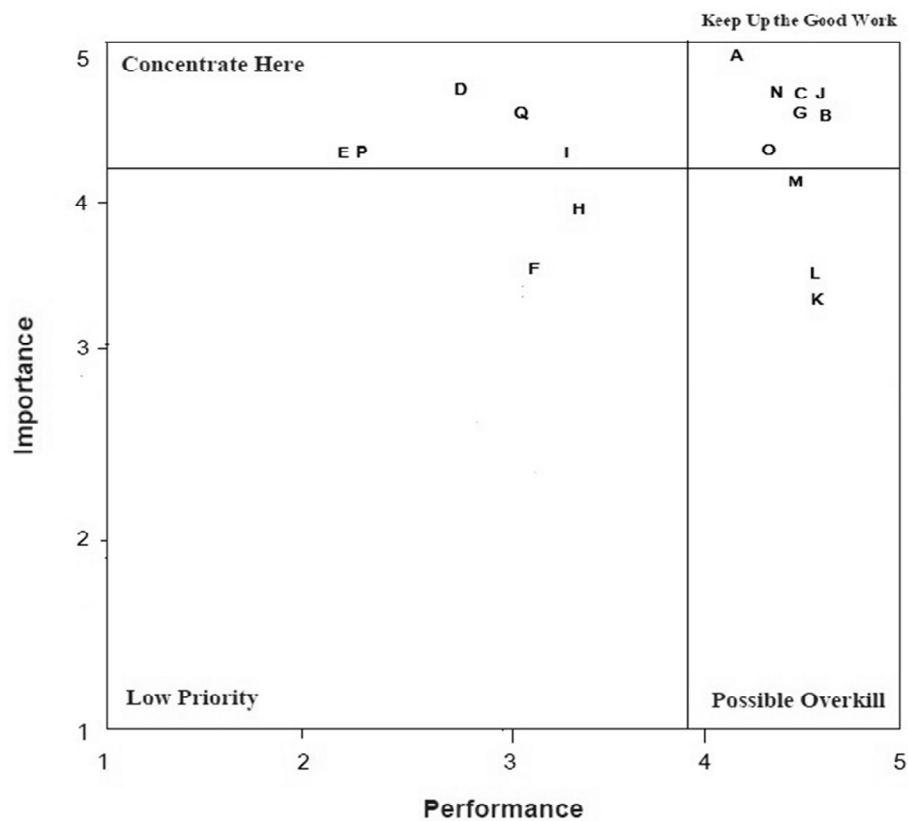
1-3. IPA grid of Korean shopping tourism industry

An Importance Performance Analysis (IPA) grid was employed to clearly compare the importance of shopping tourism attributes and the performance of the Korean shopping tourism experience as perceived by Chinese travelers. The result will provide recommendations for proper reallocation of resources to areas where there is a need for further improvement.

The mean scores calculated in Table2 were adopted and the results were drawn in the IPA grid. The grand means of both importance and performance were used as the standard of the axes of the grid. As shown in table3, 2 factors were plotted on the “Concentrate here” quadrant, 2 factors

were plotted on the “Keep up the good work” quadrant, 3 factors were placed on “low priority” quadrant, and 1 was on the “possible overkill” quadrant.

<Table 3. IPA grid of Korean case>



Quadrant1. Concentrate here

There were 5 attributes plotted on the concentrate here quadrant: E (Language accessibility), D (Diversity of goods and services), I (Local people's kindness, manners), P (Accessibility to Korea), and Q (Accessibility to shopping information).

These factors were rated above average in importance but calculated to be below average in performance. Results on this quadrant indicate that Chinese tourists think these attributes are very important when they choose shopping tourism destinations, but the performance of the Korean shopping tourism industry in this aspect is not so satisfactory for Chinese.

In this regard, it is suggested that more effort and resources as well as attention need to be put on these factors. For instance, both public and private sectors can employ more Chinese – speaking workers to lower the barriers between the tourism destination and Chinese travelers. For the problem of diversity of goods and services, the government can conduct kinds of policies to lower the rent fee of famous shopping spots to let mid – size brands easily enter these place.

There were two problems that stem from 'Accessibility, or a lack

thereof. For Chinese, it is always hard to go on outbound trips because they have to go through several complicated procedures. To promote more Chinese visits to Korea and to be more competitive vis-à-vis other countries, we should loosen the check-up system and enlarge visa-free zones as well. It was also shown that Chinese tourists could not easily find out information about Korea. About this, we can do more advertisement about shopping spots and events in China as well as building up mobile applications which can provide information they need.

Quadrant2. Keep up the good work

Among all 17 attributes, 7 were plotted on the keep up the good work quadrant:

A: Can purchase what we want, B: Reliability of goods and services, C: Price is acceptable, G: Security, N: After service, J: Staff's attitude and manner, O: After service. These factors were rated above grand mean scores in both importance and performance. The results of this quadrant indicate that in general, the Korean shopping tourism industry performs well in regards to these factors

Those attributes are what Chinese shopping travelers think are

important, so proper efforts and resources need to be allocated on them to maintain or improve the quality of these factors.

One interesting thing is that among all factors of ‘goods and services’ category, three were placed in this quadrant, indicating that the products and services made by Korean are regarded as high quality, dependable, and competitive.

Yet performance scores of 5 factors in this quadrant were below those of the importance scores, which means that performance of those 5 attributes are ‘acceptable’ but not ‘fully satisfactory’ in the Chinese tourists’ regard. So even if Korea is performing quite well in these respects, both public and private sectors still need to put more efforts to meet shopping tourist’s demand and consolidate the competitiveness we have.

Quadrant3. Low priority

Two attributes were located on the low priority quadrant: F: Abundant tourism attraction resources; H: Local price of goods and services. They were rated below mean scores of both importance and performance. The results of this part indicate that fewer resources and efforts should be expanded in this attributes. Even if the performance of the Korean shopping

tourism industry in these factors was below average, efforts and resources need not be overly focused on these areas, because Chinese tourists think factors in this quadrant are not so important. However, this does not mean that the Korean shopping tourism industry should relocate its efforts and resource to other aspects. Both factors had mean scores over 3.5, indicating that Chinese respondents rated them as quite important. In other words, poor performance will possibly bring about higher dissatisfaction with the Korean shopping tourism industry.

Quadrant4. Possible overkill

Three factors were plotted on the possible overkill quadrant: M: Cleanliness and luxury of shops, L: Discount system, K: Operation time of shopping destination. The results in this area indicate that the factors were rated lower than the grand mean score of importance, and that the performance of the Korean shopping tourism industry in these aspects were rated higher than the average. In fact, Chinese shopping tourists may consider these factors as not so important compared with other attributes, but good performance was observed. So, resources and efforts should not be overly invested in these factors.

2. Hong Kong Case

<Table 4. Importance and Performance of Hong Kong>

Major Factor	Factors name	Mean value (Performance)	Mean value (Importance)
Goods and services	a. Can purchase what we want	4.172727	4.807339
	b. Reliability of goods and services	4.118182	4.445455
	c. Price is acceptable	4.081818	4.566038
	d. Diversity of goods and services	3.2	4.504587
Society of destination	e. Language accessibility	4.654545	4.238532
	f. Abundant tourism attraction resources	3.354545	3.632075
	g. Security	4.258182	4.542857
	h. Local price of goods and services	4.209091	3.925234
	i. Local people's kindness, manners	4.409091	4.345455
Shopping destination quality	j. Staff's attitude and manner	4.3	4.563636
	k. Operation time of shopping destination	4.472727	3.135922
	l. Discount system	4.363636	3.14433
	m. Cleanliness and luxury of shops	4.390909	4.155963
	n. After services	4.272727	4.409091

Accessibility	o. Efficiency of local transportation,	4.327273	4.272727
	p. Accessibility to Hong Kong	4.236364	4.421569
	q. Accessibility to shopping information	4.290909	4.485981
Grand Mean Score		4.238182	4.211576

2-1 . Performance of Shopping Tourism in Hong Kong

As with the Korean case, mean scores of the attributes relevant to Hong Kong shopping tourism's performance were also evaluated. The survey results are reported in table 4. The mean scores of all 17 factors ranged from high of 4.65 to low of 3.2. Mainland Chinese tourists rated 'Language accessibility' (4.654), 'Operation time of shopping destination' (4.472), 'Local people's kindness, manners'(4.409), 'Cleanliness and luxury of shops' (4.390) with high scores. This indicates that from the Chinese tourist's perspective, Hong Kong's shopping tourism industry has strong advantages in these factors.

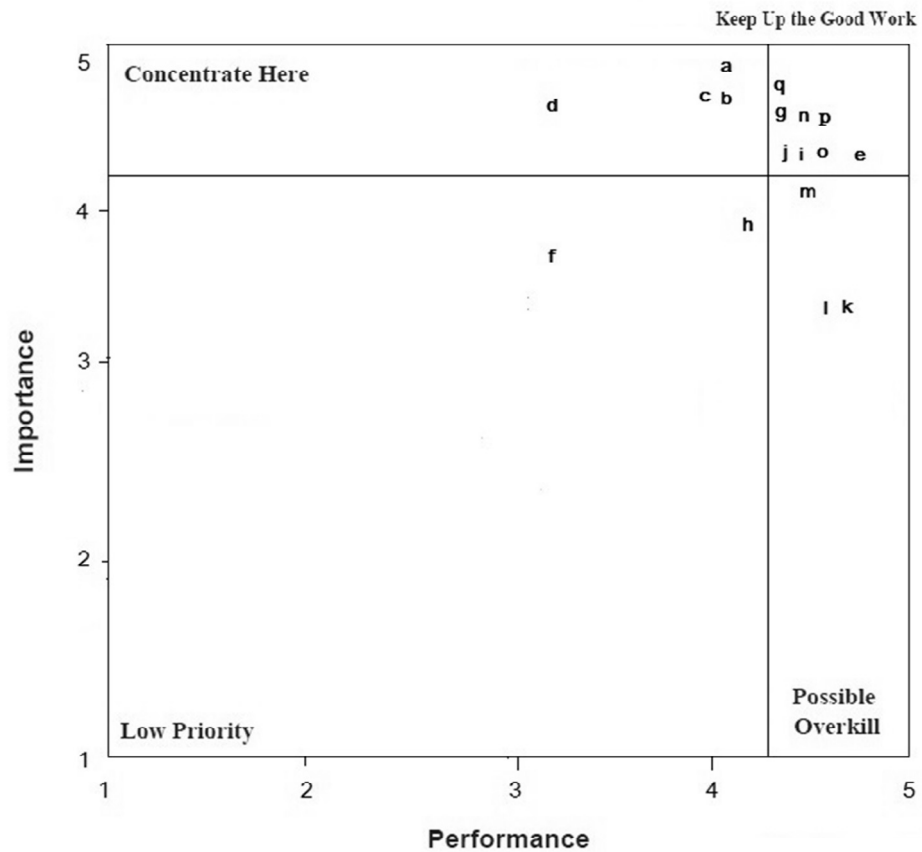
By contrast, Chinese people rated that the worst factors as 'Diversity of

goods and services' (3.2), 'Abundant tourism attraction resources' (3.354), and 'Price is acceptable' (4.081).

Just like Korea, 'Diversity of goods and services' was calculated to be very low in 'goods and services' category. Actually, Hong Kong doesn't have famous brands of its own. Its shopping tourism industry highly depends on selling foreign luxury brands in duty free stores. Plus, just like Korea, in famous shopping regions, only a handful of famous brands can afford the expensive rent fee. In this case, what Chinese tourists can see and purchase are goods provided by a few foreign brands.

2-2. IPA grid of the Hong Kong case

<Table 5. IPA grid of the Hong Kong case>



Quadrant1. Concentrate here

There were 4 attributes plotted on the concentrate here quadrant: a (Can purchase what we want), b (Reliability of goods and services), c (Price is acceptable), d (Diversity of goods and services).

Interestingly, all factors belonging to the 'goods and services' category were located on this quadrant. It indicates that mainland Chinese tourists are not so satisfied with the goods and services provided by the Hong Kong shopping industry.

In this regard, it is suggested that more effort and resources as well as attention need to be relocated on these factors. For instance, in terms of brand diversity, both public and private sectors can lower the trade barrier and loosen the admission process to have more foreign brands enter into shopping regions.

Quadrant2. Keep up the good work

Among all attributes, 8 were located on the keep up the good work quadrant:

e. Language accessibility, g: Security, i: Local people's kindness, manners, j: Staff's attitude and manner, o: Efficiency of local transportation, q: Accessibility to shopping information, n: After service, p: Accessibility to Hong Kong

These factors were rated above the grand mean score of both importance and performance. The results of this quadrant indicate that in general, Hong Kong's shopping tourism industry performs well in these aspects.

An interesting thing is that among all factors in the 'Society of destination' category, four were located on this quadrant, indicating that Chinese tourists are familiar with the atmosphere of Hong Kong's culture and society.

But performance scores of 5 factors (g: Security, j: Staff's attitude, n: After service, p: Accessibility to Hong Kong, q: Accessibility to shopping information) in this quadrant were still below scores of their respective importance, indicating that performance in those 5 attributes are 'good' but not 'fully satisfactory' from the Chinese perspective. So even if Hong Kong

is performing quite well in these aspects, both public and private sectors still need to put more effort to meet shopping tourists' demand and consolidate the competitiveness they have.

Quadrant3. Low priority

Two attributes were located on the low priority quadrant: f: Abundant tourism attraction resources; h: Local price of goods and services. They were rated below the grand mean scores of both importance and performance. The results of this part indicate that fewer resources and efforts should be put in these attributes. Even if the performance of the Hong Kong shopping tourism industry in these factors was below average, efforts and resources need not be overly focused on these areas, because Chinese tourists don't think factors in this quadrant are important. However, this does not mean that Hong Kong's shopping tourism industry should relocate its efforts and resources to other aspects. Both two factors had mean scores over 3.5, indicating that Chinese respondents think them to be quite important. In other words, poor performance in these factors would possibly bring about higher dissatisfaction with the Hong Kong shopping tourism industry.

Quadrant4. Possible overkill

Three factors were plotted on the 'Possible overkill' quadrant: M: Cleanliness and luxury of shops, L: Discount system, and K: Operation time of shopping destination. The results in this area indicate that these factors were rated as lower than the grand mean of importance, and that the performance of the Hong Kong shopping tourism industry in these aspects were rated higher than the average. In fact, Chinese shopping tourists may consider these factors as not so important compared to other attributes, but good performance was observed. Resources and effort should not be overly put on this area.

VII. Discussion - Comparative approach

Through the grid, we can see that both South Korea and Hong Kong have advantages and disadvantages in terms of shopping tourism competitiveness. Plus, grids also show that both shopping tourism competitors have similarities as well as differences. In this section, the advantages and disadvantages as well as common points and differences

will be analyzed through a Comparative approach to draw policy implications for South Korea.

1. Overall performance

Table 3.1 shows that grand mean score of performances of South Korea is higher than 3 but lower than 4, indicating that from Chinese perspective, Korean performances in terms of the shopping industry are worse than 'satisfactory'. By contrast, Table 3.2 shows that Hong Kong received grand scores higher than 4, implying that Chinese tourists think Hong Kong's shopping tourism industry is more than 'satisfactory'.

Results also show that Korean performance in 6 factors was not so satisfactory, and among them 3 factors (Diversity of goods and services, language accessibility, accessibility to Korea) were even below 3, indicating that the Korean shopping industry does quite bad in these areas.

The interesting thing is, Hong Kong has only two factors below 4.0 (Diversity of goods and services, abundant tourism attraction resources). But these factors were higher than 3.0, implying that Chinese people think Hong Kong's performance in most factors are quite good.

The estimation of grand scores and performance scores of each one of the factors all show that Hong Kong's overall performance is better than

Korea.

2. Strong and weak point

According to Grid 3.1, there were 7 factors plotted on Quadrant2 of 'Keep up the good work', indicating Korean shopping tourism has advantage in these attributes. Among them, factors A, B, C all belong to the major factor of 'Goods and services'. This means that from the Chinese perspective, the Korean shopping tourism industry is strong in goods and services except with 'Diversity of goods and services'.

By contrast, Table 5 shows that all four factors of 'Goods and services' are on the 'Concentrate here' quadrant, indicating that Hong Kong's shopping tourism industry weak in terms of goods and services.

But it also shows that Hong Kong has strong points in this particular sector. Through the Table5, we can see that among all factors in the 'Keep up the good work' quadrant, factors o, p, q (Efficiency of local transportation, Accessibility to Hong Kong, Accessibility to shopping information) belong to the major factor of 'Accessibility', indicating that for Chinese tourist, it is easy to access shopping tourism destinations as well as shopping information in Hong Kong.

For the tourism industry, providing good accessibility is more

important than providing high quality goods and services. The European Commission also empathize that:

“Accessible tourism is about making it easy for everyone to enjoy tourism experiences. Making tourism more accessible is not only a social responsibility – there is also a compelling business case for improving accessibility as it can boost the competitiveness of tourism in Europe. Evidence shows that making basic adjustments to a facility, providing accurate information, and understanding the needs of people can result in increased visitor numbers. Improving the accessibility of tourism services increases their quality and the enjoyment of all tourists. It also improves the quality of life in local communities.”

Hong Kong actually has been dedicating a lot to ‘accessibility’. For example, Hong Kong’s tourism commission has been running websites which provide almost all the information people need, such as tourism strategies, shopping information, and shopping event. Plus, well-developed public transportations and a relatively smaller size of land have also created positive conditions for its ‘accessibility’ competitiveness.

3. Common points

Another interesting point is, ‘Cleanliness and luxury of shopping destination’, ‘Discount system’, ‘Operation time of shopping destination’ were plotted on the ‘possible overkill’ quadrant in both South Korean and Hong Kong grids. It means these two competitors are commonly mobilizing resources on parts that are not so important.

A more interesting thing is, these three factors all belong to major factor of ‘Shopping destination quality’. According to Laurie Murphy, the pattern of purchasing can be divided into two kinds: an ‘intrinsic way’, and a ‘summative way’. The customers which exhibit the former pattern highly care about exact goods and services they want. The customers which exhibit the latter pattern not only care about goods and services, but also think highly of summative things such as the environment of shopping region and its, discount policy.²⁶

In this regard, the result can be explained such that Chinese shopping travelers spend money in an ‘intrinsic way’. For them, their purpose is to

²⁶ Murphy, Laurie. *Tourist Shopping Villages: Forms and Functions*. New York: Routledge, 2011.

purchase what they exactly want during the traveling period and summative things are not so important. Therefore, both shopping tourism competitors should focus less on these parts and reallocate the resources on factors in need.

4. Implications and recommendations

4-1. Ethical problems

As shown in Table3, Korea was badly rated in the field of ‘local people’s kindness, manners’. There are many reasons, but among them, the most noticeable one are fraud committed by sales workers and taxi drivers. According to the Korea Culture and Sports Department, in recent years, Chinese tourists are constantly cheated, causing a lot of disgruntled visitors, unwilling to revisit South Korea. These unethical and even illegal actions have gradually become an obstacle to the development of the Korean tourism industry. In this regard, we have to figure out this problem by enhancing watchdog systems such as ‘tourism paparazzi system’ or expanding the scale of ‘tourist police’. ²⁷

²⁷ Choi, Tsan-Ming, Shuk-Ching Liu, Ka-Man Pang, and Pui-Sze Chow. "Shopping Behaviors of Individual Tourists from the Chinese Mainland to Hong Kong." *Tourism*

4-2. Increase accessibility

Communication barriers (Language accessibility) are a reason for bad performance in terms of the ‘accessibility’ factor. It is thus suggested that shopping regions targeting Chinese tourists (plus foreign tourists) should put more efforts into enhancing fluency of their sales-floor staff. Besides, the stores should provide information in simplified-Chinese so as to stimulate Chinese tourists’ purchasing intention as they can read the information and understand key promotion campaigns. Korea could also provide some simplified-Chinese translations of those commonly used traditional Chinese terms in their leaflets for tourists’ reference. By doing so, effective communication and useful information can be delivered to Chinese tourists.

4-3. Diversify tourism resources

Korea has now become one of the countries a lot of Chinese people are willing to go to. As mentioned above, most of them visit Korea for the purpose of purchasing goods and services. But, the problem is they don’t

Management 29, no. 4 (2008): 811-20. doi:10.1016/j.tourman.2007.07.009.

consider other types of tourism experience: Korean IPA analysis results show that factor F: ‘Abundant tourism attraction resources’ was considered not so important from the Chinese perspective, indicating that Chinese shopping travelers rarely think about other types of traveling options (such as visiting cultural destinations, historical attractions) in Korea.

Of course, the shopping tourism industry does have positive effect on Korean economy, since it can boost domestic consumption and can generate more job positions. But depending much on this type of tourism industry poses a danger in the long term. For instance, recently, the Chinese government has developed a lot of duty free shops and increased regulations on the amount of purchasing allowed in foreign countries, as a part of its measures to boost domestic consumption.²⁸

In this case, there might be less Chinese visitors willing to go to Korea because Korea would be less attractive as a shopping tourism destination. In this regard, we have to diversify our tourism policy by promoting medical, historical and cultural tourism (like Han-Ryu program).²⁹

²⁸ Accessed July 22, 2016. <http://english.hankyung.com/news/apps/news.view?c1=04>.

²⁹ "South Korea's Ambitions in Medical Tourism - FT.com." Financial Times. Accessed July 22, 2016. <http://www.ft.com/cms/s/0/b84a4f08-4570-11e4-9b71-00144feabdc0.html#axzz4FCBWjJTE>.

4-4. Cultural value is more important than economy

Famous tourism attractions such as Hong-Dae, Myung-Dong, and Insa-Dong were once famous for art, culture and fashion. Now, these places are occupied by famous cosmetics, fashion, jewelry retailers and have lost their charming features. Bringing famous brands into cultural and historical attractions does provide better accessibility for purchasing goods and services, and this definitely is good for economy. But we have to keep in mind that there is something more important than money. Because of this situation, those colorful tourism attractions are now losing their identity. For visitors with the purpose of experiencing culture and history, the only things they can see are familiar brands seen at other tourism destinations.³⁰ In this regard, policy-makers have to tighten regulations on the expansion of retailers and brands.

³⁰ Accessed July 22, 2016. <http://news.mk.co.kr/newsRead.php?no=1150175>.

VIII. Conclusion

The main purpose of this research was to examine the competitiveness of the Korean shopping tourism within the dimensions of ‘goods and services’, ‘local society’, and ‘accessibility’. With the application of an Importance Performance Analysis grid, we clearly saw that Korea is strong in ‘goods and services’ but weak in ‘accessibility’.

Then, to understand how this can be applied to potential policy implications, a comparative analysis between South Korea and Hong Kong was conducted. The results proved that from the Chinese perspective, the overall performance of Hong Kong’s shopping tourism industry is better than South Korea’s. Plus, the results also showed that Hong Kong has a strong advantage in accessibility but is weak in the ‘goods and services’ aspect. But as mentioned above, Hong Kong is one of the most popular shopping tourism destinations and receives nearly 40million Chinese tourists annually, which is ten times higher than South Korea. This indicates that for Chinese shopping travelers, the information about shopping, accessibility to the country (or region), and efficiency of transportations are more matter than goods and services.

The results also showed South Korea and Hong Kong have similar

problems. These two competitors have been devoting a lot to the development of the shopping tourism industry, but this has brought about certain problems: first, famous cultural and historical tourism regions are losing their color because so many cosmetics, clothes, jewelry retailers are operating sales in these areas. Second, both competitors are wasting resources on unnecessary parts. South Korea and Hong Kong showed good performance in ‘Cleanliness and luxury of shopping destination’, ‘Discount system’, ‘Operation time of shopping destination’. But the results proved that Chinese tourist don’t care about these factors. So, it would be better to focus less on these factors and relocate resources to the factors in urgent need.

The results of research revealed that the Korean shopping tourism industry has something it needs to learn from Hong Kong, which proved to be ‘accessibility’ as one of the keys for boosting its shopping tourism industry. At the same time, we could see that depending only on the ‘shopping’ aspect will bring side effects: the loss of culture. In this regard, we have to be cautious when we enhance shopping tourism industry, pay attention to co-existence and balanced development of culture and the shopping industry.

Lastly, there have been several limitations for the research: first, the

Likert scale, which had been adopted for the questionnaire, cannot distinguish between subtle differences in levels of Importance and Performance. And, the study did not consider possible intervening factors that may affect the composition of grid. Future studies need to incorporate several intervening factors. Plus, the biggest limitation was small amount of samples. After the survey conducted, nearly 120 samples were analyzed. 120 samples are possibly acceptable for quantitative research, but still there needs to be more samples to increase the robustness of the results.

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국문초록

한국 - 홍콩의 쇼핑관광 경쟁력 비교분석

‘경쟁력’은 관광산업의 성공을 결정짓는 중요 요인이고, 이러한 경쟁력은 관광상품을 제공하는 사람 혹은 조직에 의해 만들어 진다.

잘 알려져 있듯 관광의 목적은 의료, 문화체험, 역사체험 등 여러 종류로 나뉜다. 최근에는 ‘쇼핑’이라는 목적이 관광의 중요요소로 부각되기 시작, 관광지 선택에 결정적인 영향을 주는 요소가 된다. 이러한 트렌드 덕분에 전 세계의 주요 쇼핑관광지는 유례없는 호황의 기회를 맞이하게 된다.

최근 중국의 경제가 급격히 성장함에 따라 삶의 질이 개선되고 해외제품에 대한 수요가 늘게 되는데, 이는 중국의 해외관광객의 증가를 가져오게 된다. 다양한 국가 중 한국은 중국인들이 우선적으로 방문하고 싶은 국가 중 하나가 되었는데, 이는 한중 양국이 지리적으로 가깝다는 점과 한류문화의 활성화 덕분인 것으로 추정된다. 한편 한국쇼핑관광이라는 새로운 트렌드가 한국경제에 긍정적인 영향을 보여줌에 따라, 정부는 더 많은 외국인 관광객, 특히 중국인 관광객을 유치하기 위한 일환으로 ‘코리아 블랙프라이데이’, ‘세금환급’과 같은 다양한 정책을 펼친다.

하지만 위의 노력에도 불구하고, 최근 한국쇼핑관광산업은 몇 가지 문제에 직면하게 된다. 대표적으로 두 가지가 있는데, 그 중 하나는 외국인들의 한국 관광에 대한 불만족도 상승이고, 다른 하나는 홍

콩과 같은 쇼핑관광경쟁자의 급부상이다.

한국관광공사의 통계자료에 의하면 한국관광에 대한 불만족 지수는 2011년 2.2%에서 2014년에 6.1%로 수직 상승한다. 지속적으로 상승하는 불만족도는 재방문율의 하락을 가져오는데, 이러한 문제가 장기화될 경우 한국쇼핑관광의 지속적인 성장이 어려워질 수 있다는 게 전문가들의 입장이다.(각주)

본 논문은 중요 - 만족도 분석이라는 방법론을 통해 한국 쇼핑관광산업의 강점과 약점, 경쟁력을 분석한다. 또한 정책적 조언을 도출해내기 위해 홍콩과의 비교분석을 진행한다.

분석에 앞서, 쇼핑관광산업과 관련된 요소들을 기반으로 중국인들을 상대로 설문조사를 진행하였다. 응답자들은 한국과 홍콩의 쇼핑관광 경쟁력을 평가하였고, 이러한 설문조사 결과는 중요도-만족도 테이블을 통해 분석하였다. 본 논문의 결과가 한국쇼핑관광의 정책에 어느 정도 긍정적인 작용을 할 수 있을 거라 믿는다.

주요어: 쇼핑관광지, 한국, 홍콩, 중국, 경쟁력, 중요도-만족도 분석

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